Talent Search (TS) and Educational Opportunity Centers (EOC) Programs
Instructions for Completing the Annual Performance Report
For Program Year 2001-02

1.   **WHAT IS THIS PACKAGE?**

This package contains the instructions needed to prepare the annual performance report for the Talent Search and Educational Opportunity Centers programs. The Department of Education uses the information provided in the performance report to assess a grantee's progress in meeting its approved goals and objectives and to determine a grantee's prior experience points in accordance with the program regulations (34 CFR 643.22 – Talent Search; and 34 CFR 644.22 – Educational Opportunity Centers).

2.   **WHAT ARE THE LEGISLATIVE AND REGULATORY AUTHORITIES TO COLLECT THIS INFORMATION?**

- Title IV, Section 402B and 402F, of the Higher Education Act of 1965, as amended (Public Law 102-325);
- the program regulations in 34 CFR Part 643 for Talent Search and 34 CFR Part 644 for Educational Opportunity Centers; and
- Sections 75.590 and 75.720 of the Education Department General Administrative Regulations (EDGAR)

3.   **WHO MUST FILE THIS REPORT?**

All grantees funded under the Talent Search and Educational Opportunity Centers programs must submit annual performance reports as a condition of grant award.

4.   **WHAT PERIOD OF TIME IS COVERED IN THE REPORT?**

The report covers the 12-month grant (budget) period. This information can be found in Block 6 of the Grant Award Notification.

5.   **WHAT INFORMATION MUST BE SUBMITTED?**

The report consists of five sections. Section I requests project identifying information; Section II requests demographic information on project participants; Section III requests information on project services and activities; Section IV requests information on project performance

outcomes; and Section V requests a brief narrative summary of other project objectives and accomplishments.

6.   WHEN SHOULD THE REPORT BE FILED?

The annual performance report should be submitted electronically via the World Wide Web within 90 days after the end of each 12-month grant (budget) period.

7.   HOW MAY THE REPORT BE SUBMITTED?

The entire report should be submitted via the World Wide Web. In addition, a grantee must submit, via fax, a signed copy of Section I of the report form that certifies that the information submitted electronically is accurate, complete, and readily verifiable.

The Web application will be available from October 15 to November 30 of each year at the following web address:

> http://www.ed.gov/HEP/trio/ts-eocperfreport.html

The Website contains the forms and instructions needed to prepare and **submit on-line** the annual performance report for the Talent Search (TS) and Educational Opportunity Centers (EOC) programs. The Web application that TS and EOC grantees will use to submit the annual performance report has the following features:

- Instructions for using the Website, an introduction to the data collection, and Online Help;
- A Web form for completing Sections I through IV on line;
- Functionality to upload an electronic file with the narrative summary of other project objectives and outcomes (Section V);
- A print button to make a hard copy of the information entered;
- A submit button to send the entire report to the Department of Education; and
- An e-mail confirmation that the report has been submitted (if an e-mail address is provided when completing Section I)

A grantee unable to submit the report via the World Wide Web should contact the assigned program specialist to discuss an alternate format for data submission. Further, if for any reason you need to revise the performance report submission, please contact your assigned program specialist before re-submitting. A state listing of program specialists' names, telephone numbers, and email addresses is available at the Web address provided above.

8. **WHO MAY BE CONTACTED FOR ADDITIONAL INFORMATION CONCERNING THE SUBMISSION OF THE PERFORMANCE REPORT?**

Please contact your program specialist directly if you have questions regarding the performance report requirements. A state listing of program specialists' names, telephone numbers, and email addresses is available at the Web address provided above.

If you have technical problems accessing the web site or using the Web application, please contact the Help Desk by either telephone (703) 846-8233 X 247 or e-mail at TSWEB@CBMIWEB.COM.

Talent Search (TS) and Educational Opportunity Centers (EOC) Programs
Specific Instructions For Completing The Performance Report

Section I: Project Identification, Certification, and Warning

A.   Identification

1.   To begin completing this report on-line, you will need to enter your PR/Award number in the box provided on the Web page and then click start. You will then be asked to confirm that the PR/Award number and associated grantee name are correct. After completing this, the PR/Award number will be automatically inserted into line 1 of Section I of the report form. Your project's PR/Award number begins with the letter "P" and is eleven digits in length. This number can be found in Block 5 of the Grant Award Notification.
2.   The name of the organization awarded the grant funds will be automatically inserted into line 2.
3.   Provide the complete address of the grantee organization listed in item #2.
4.   Provide the name of the project director or other person that may be contacted for further information.
5.   Provide the telephone number; fax number and electronic mailing address for the project director/contact person.
6.   The project period covered by this report will automatically be inserted. These dates should correspond to the budget period found in Block 6 of the Grant Award Notification.
7.   The type of report being submitted will be inserted automatically based on the project's PR/Award number. If you have both a Talent Search and Educational Opportunity Centers project, you must submit separate reports for each project.
8.   Provide the name, telephone number, and electronic mailing address for the data entry person who has completed the online form.

B.   Certification

The project director is the person responsible for administering the project in accordance with the terms and conditions of the grant.

The certifying official is the individual (successor or designee) who signed the grant application on behalf of the institution or agency.

C.   Warning

Further Federal funds or other benefits may be withheld under these programs unless this report is completed and filed as required by existing law (20 U.S.C. 1231a) and regulations (34 CFR 75.590 and 75.720)

Section II: Demographic Profile of Project Participants

Number of Participants Funded to Serve

In accordance with section 643.22 (b)(1) of the Talent Search regulations and section 644.22 (b)(1) of the Educational Opportunity Centers regulations, please provide the number of participants your project was funded to serve during this reporting period. Note: If this number is different than the Department's number, staff will contact you to resolve the discrepancy.

A.   **Number of Participants Assisted**

In completing this section of the report, please keep in mind the following definitions of a project participant provided in the program regulations in 34 CFR 643.7 (Talent Search) and 34 CFR 644.7 (Educational Opportunity Centers).

A **Talent Search** participant means an individual who: (1) is determined to be eligible to participate in the project under section 643.3; and (2) receives project services designed for his or her age or grade.

An **Educational Opportunity Centers** participant means an individual who: (1) is determined to be eligible to participate in the project under section 644.3; and (2) receives project services.

Only those individuals who meet the definitions of participants should be counted in this section of the report.

For Talent Search and Educational Opportunity Centers projects that serve participants for more than one year, provide separate counts of the number of new and continuing participants in A1 and A2. Otherwise, just provide the total number of participants in A3. A new participant is one served by the project for the first time during this reporting period. A continuing participant is one who was served by the project for the first time in another reporting period and who received project services during this reporting period.

A3 should be the total of A1 and A2, if applicable, and should be the number of participants served by the project during the reporting period.

B.   **Participant Distribution by Eligibility**

The statute and regulations governing the Talent Search and Educational Opportunity Centers programs require that an individual, at the time of initial selection for the project, must be a "low-income individual," a "potential first generation college student," or be in need of project services. (These terms are defined below.) Two-thirds of project participants each year must be both low-income and potential first-generation college students; the remaining one-third

can be either low-income, potential first-generation college student, or any individual in need of services. Students may be counted only once in this breakout. The total reported must agree with the number in "A3" above.

Low-income individual means an individual whose family's taxable income did not exceed 150 percent of the poverty level amount in the calendar year proceeding the year in which the individual initially participated in the project. The poverty level amount is determined using criteria of poverty established by the Bureau of the Census of the U.S. Department of Commerce.

Potential first generation college student means (1) an individual neither of whose natural or adoptive parents received a baccalaureate degree; or (2) an individual who, prior to the age of 18, regularly resided with and received support from only one parent and whose supporting parent did not receive a baccalaureate degree; or (3) an individual who, prior to the age of 18, did not regularly reside with or receive support from a natural or adoptive parent.

In the Other category (B4), count those project participants who are neither low-income nor potential first-generation college students. The total should agree with the number in "A3".

C.   Participant Distribution by Ethnic Background

These data are not mandatory but are extremely helpful to the Department in reporting on the ethnic characteristics of participants served by the program. The total should agree with the number in "A3".

The race/ethnicity categories used in this section are consistent with the Department of Education's policy on the collection of racial and ethnic information. These categories are defined as follows: **American Indian or Alaska Native** - A person having origins in any of the original peoples of North America, and who maintains cultural identification through tribal affiliations or community recognition. **Asian** - A person having origins in any of the original peoples of the Far East, Southeast Asia, and the Indian subcontinent. This area includes, for example, China, India, Japan, Korea, and the Philippine Islands. **Black or African American** - A person having origins in any of the black racial groups of Africa. **Hispanic or Latino** - A person of Mexican, Puerto Rican, Cuban, Central or South American or other Spanish culture or origin, regardless of race. **White** - A person having origins in any of the original peoples of Europe, North Africa, or the Middle East. **Native Hawaiian or Other Pacific Islander** – A person having origins in any of the original peoples of Hawaii or other pacific islands such as Samoa and Guam. For those participants of a multi-racial background, include them in C7 for **More than one race reported**. The total should agree with the number in "A3".

D.   Participant Distribution by Gender

As noted above, though these data are not mandatory, they are helpful to the Department in reporting on the gender representation of project participants. The total should agree with the number in "A3".

E.   Participant Distribution by Age

The data requested here represent age ranges most consistent with age groups targeted for services by the Talent Search and Educational Opportunity Centers programs statute and regulations. Given the different age limitations in the two programs as well as the permissible exceptions provided by statute, this information aids the Department in validating the numbers of middle school students, secondary school students, youth, and adults served by each project. The total should agree with the number in "A3".

The data reported here should reflect the age of project participants at the **beginning of the reporting period.** For a new participant, not in school at the beginning of the report period, report on the age of the participant at the time that individual is selected to participate in the project.

F.   Participant Distribution by Grade Level

The data requested here represent the grade/educational attainment levels most consistent with groups targeted for services by the Talent Search and Educational Opportunity Centers programs statute and regulations. Given the different target populations of the two programs as well as the permissible exceptions provided by statute, this information aids the Department in validating the numbers of middle school students, secondary school students, youth, and adults served by each project. The total should agree with the number in "A3".

The data reported here should reflect the grade level/educational attainment level of project participants at the **beginning of the reporting period** or for new participants, the grade level of the participant at the time the individual was selected to participate in the project.

F1. Middle school/junior high school **(TS only)**- Report in this category the number of project participants who at the beginning of the reporting period were in grades six, seven, or eight.

F2. High school (9th-11th grade) -- Report in this category the number of project participants who, at the beginning of the reporting period, were in grades nine, ten, and eleven. Include twelfth graders on line F3.

Note: Some school districts include ninth grade as part of the junior high school. However, for consistent national data collection and reporting, please use the definitions provided.

F3. <u>High school (12th grade only)</u> -- Report in this category the number of project participants who, at the beginning of the reporting period, were high school seniors. These data will be used to determine the number and percentage of high school seniors who graduated and the number and percentage of graduates who applied for admission and/or enrolled in programs of postsecondary education.

F4. <u>Secondary school dropout</u> -- Report in this category the number of project participants who, at the beginning of the reporting period, had dropped out or were officially dismissed from their secondary school before receiving a high school diploma or completing a high school equivalency program.

A <u>secondary school</u> means a school that provides secondary education as determined under applicable State law, except that it does not include education beyond grade 12.

F5. <u>High school (or GED) graduate</u> -- Report in this category the number of project participants who, at the beginning of the reporting period, had already obtained a high school diploma or completed a high school equivalency program.

F6. <u>Postsecondary dropout</u> -- Report in this category the number of project participants, who at the beginning of the reporting period, had been enrolled in a program of postsecondary education but had halted their studies prior to obtaining a certificate or degree.

F7. <u>Postsecondary student</u> **(EOC only***)*-- Report in this category the number of project participants who, at the beginning of the reporting period, were enrolled in programs of postsecondary education.

G.   Veterans Served

Provide the number of veterans served by the project. The definition of a veteran is found in the Talent Search regulations in 34 CFR 643.7 and in the Educational Opportunity Centers regulations in 34 CFR 644.7.

H.   Participants of Limited English Proficiency

Talent Search and Educational Opportunity Centers projects <u>may</u> adapt project services to meet the needs of students of limited English proficiency. If applicable for your project, please provide the number of project participants with limited English proficiency.

<u>Limited English proficiency</u>, with reference to an individual, means a person whose native language is other than English and who has sufficient difficulty speaking, reading, writing, or understanding the English language to deny that

individual the opportunity to learn successfully in classrooms in which English is the language of instruction.

I.   List of Target Schools

Please provide the following information for **each** secondary school served by your Talent Search project (or Educational Opportunity Centers project, if applicable) during the reporting period: the name of the target school; the city; the state; and zip code.

A target school means a school designated by the grantee as a focus of project services.

Section III: Project Services and Activities

This section, in conjunction with Section IV, is designed to obtain a profile of the number of participants who have received the various services authorized under the program. Since Talent Search and Educational Opportunity Centers projects usually provide services and activities designed for three age/education levels (middle school students, high school students, and adults), please report on services provided (and the numbers of participants receiving these services) by these age/education levels.

As no one project will choose to provide all the allowable services, **report only on those services your project offers**. Be sure to report on the number of project participants who received each of the services provided by your project. (Please note that the number of participants receiving a particular service (i.e., tutoring) cannot exceed the total number of participants served during the reporting year.) Since a participant might engage in more than one service/activity, you may count this participant once in each category where applicable.

Middle school **(TS only)**- Report in this column the number of project participants served who were in grades six, seven, or eight.

High School **(9th-12th grade)** -- Report in this column the number of project participants served who were in grades nine, ten, eleven, and twelve. Include in this column individuals who have dropped out of secondary school and who are not beyond the age of compulsory education.

Note: Some school districts include ninth grade as part of the junior high school. However, for consistent national data collection and reporting, please use the definitions provided.

Adults -- Report in this column the number of adults. Include in this column the number of project participants served who had completed high school, received a GED, or who are beyond the age of compulsory education.

The <u>Number of Sessions, Activities, Events, and Organizations</u> categories should reflect the total number of these provided. For example, the project may have conducted 50 tutoring sessions for 15 middle school students.   Thus, under the "Tutoring" column, the project should indicate No. of Sessions - 50, No. of Participants - 15.

Use the following definitions in completing this section.

<u>Tutoring</u> means individual or small group tutoring provided by professional staff or students who are either part-time paid, volunteer, or internship-for-credit students.

<u>Assisted (computer) lab</u> means academic support or tutoring provided through a learning or computer center and can include computer-assisted instruction.

<u>Test taking and study skills development</u> means workshops, tutoring, or individualized assistance specifically designed to help students develop the skills necessary to succeed in academic programs and to meet scoring requirements on national or state standardized tests for students for admission into a postsecondary educational institution or to pass a high school equivalency exam.

<u>Counseling</u> means assistance with personal, educational and career decision-making.

<u>Academic advising/course selection</u> means assisting students in making educational plans, selecting appropriate courses, meeting academic requirements, and planning for high school graduation and admission to a postsecondary educational institution.

<u>Mentoring</u> means a variety of personal or academic support activities provided by other students or professionals and designed to expose project participants to careers and other educational opportunities available to them.

<u>Cultural activities</u> means any project sponsored activities, such as field trips, special lectures, and symposiums, that have as their purpose the enrichment of the project participants' academic progress and personal development.

<u>College orientation activities</u> means workshops, college fairs, or project sponsored trips to other postsecondary institutions for the purpose of acquainting students with a variety of postsecondary educational opportunities.
<u>Family activities</u> means events, workshops, meetings, and counseling designed to provide families with information on postsecondary educational opportunities and financial aid available and to involve them in the educational decisions of their children.

Referrals to other service providers means the formal and informal network of social service programs and community organizations, including other TRIO programs, that are available to help project participants. Report here on the number of organizations or programs to which the project routinely refers participants and the number of participants referred for services during this reporting period.

Section IV: Project Performance Outcomes

This section of the annual report is your opportunity to report on your project's progress in meeting its approved objectives related to the goals of the programs and that respond to the prior experience criteria contained in the program regulations (34 CFR 643.22 – Talent Search; and 34 CFR 644.22 – Educational Opportunity Centers). Keep in mind that the annual performance report will be used to assess your project's prior experience points, so it is imperative that you provide sufficient information to determine your project's success in meeting the purposes of the Talent Search and Educational Opportunity Centers programs.

In this section state your approved objectives related to each of the prior experience criteria in quantifiable terms (percentage of participants) and then provide the requested data under "Participant Status" that will demonstrate the extent to which your project achieved each of these objectives.

A.   Secondary School Retention, Graduation, and Re-Entry

All Talent Search projects and any Educational Opportunity Centers project that have been approved to serve secondary school students should complete this part of the report.

Please list the approved project objectives for secondary school retention, graduation, and re-entry, if applicable, in measurable terms.

The retention objective should include all secondary students (middle and high school) to be served by the project and estimate the percentage that will continue in secondary school for the next academic term.

The graduation objective should project the percentage of high school seniors (and GED students or alternative education students) served by the project who will receive a high school diploma or complete a high school equivalency program during the reporting period.

The re-entry objective should project the percentage of secondary school dropouts to be served by the project who will re-enter high school or enroll in a high school equivalency program during the reporting period.

Participant Status

All data provided should reflect the educational status of project participants at the end of the reporting period or for the fall term.

A1. <u>Continued in middle school</u>- Report on the number of middle school participants who have advanced to the next grade level in middle school. For example, report on all students who have passed from 6th grade to 7th grade, and 7th grade to 8th grade.

A2. <u>Promoted from middle school to high school</u>- Report on the number of middle school participants who have advanced to high school. **Include participants entering the ninth grade.**

A3. <u>Continued in high school</u>- Report on the number of high school participants who have advanced to the next grade level in high school. For example, report on all students who have passed from 9th grade to 10th grade, 10th grade to 11th grade, and 11th grade to 12th grade. **Do not include those participants who have graduated.**

A4. <u>Re-entered middle school </u>- Report on the number of participants who re-entered middle school during the reporting period or for the fall term.

A5. <u>Re-entered high school </u>- Report on the number of participants who re-entered high school during the reporting period or for the fall term.

A6. <u>Received high school diploma</u> - Report on number of project participants who graduated from high school during the reporting period.

A7. <u>Obtained a high school equivalency degree</u>- Report on the number of participants who have completed requirements to obtain a certificate of high school equivalency.

B.   Admissions and Financial Aid Assistance

This part of the report should be completed by all Talent Search and Educational Opportunity Centers projects.

Please list the approved project objectives for providing project participants assistance in applying for admissions and student financial aid. "College ready" project participants include 12th grade high school students and high school (and high school equivalency) graduates.

Participant Status

B1. <u>Applied for postsecondary admission</u>- Report on the number of participants who were assisted with college entrance applications. Do not include in this field

high school students who are taking postsecondary courses while still in high school.

B2. <u>Applied for student financial aid</u>- Report on the number of participants who were assisted in completing financial aid forms. This includes scholarship applications, U.S. Department of Education federal student financial aid forms, and state applications for financial aid.

C.   Postsecondary Admission and Re-Entry

This part of the report should be completed by all Talent Search and Educational Opportunity Centers projects.

Please list the approved project objectives for postsecondary admissions and re-entry in measurable terms.

Participant Status

All data provided should reflect the educational status of project participants at the end of the report period or the beginning of the fall academic term.

C1. <u>Postsecondary admissions</u>- Report on the number of high school graduates and participants who have completed requirements to obtain a high school equivalency degree, and other eligible individuals who enrolled in programs of postsecondary education for the first time during this reporting period or have been admitted for the next academic term. Do not include in this field high school students who are taking postsecondary courses while still in high school.

C2. <u>Postsecondary re-entry</u>- Report on the number of participants who were previously dismissed or who halted their educational progress towards a postsecondary degree, but who re-enrolled in a program of postsecondary education during the reporting period or have been re-admitted for the next academic term.

Note: Do not include enlistment in the armed services as a postsecondary outcome. Enlisting in the military, while a worthwhile goal for many participants **is not considered a program of postsecondary education.** However, enrollment at a military college or academy (i.e., West Point Academy or the Naval Academy at Annapolis) is considered a postsecondary educational program.

D.   Postsecondary Placements (Types Of Institutions)

For those project participants enrolled in or admitted to programs of postsecondary education as reported in Section IV, C, indicate the number of participants enrolled in or admitted to by type of postsecondary institution.

E. OTHER PARTICIPANT STATUS

Report here on those project participants who did not complete their educational programs. This includes individuals who dropped out of middle school or high school before obtaining a high school diploma, those who did not receive a certificate or degree from a postsecondary institution, and those who chose to end or interrupt their educational plans to seek employment or join the military. For example, other circumstances which may affect a participant's status and cause them to not complete their educational program are transferring out of the target area; marriage; pregnancy; suffering an illness; or death. Report those who did not complete their educational programs under the "Other" category. Use the "Unknown" category for any project participant whose status is either unknown or unconfirmed.

Section V: Summary of Other Project Accomplishments

In this section briefly describe approved project objectives **not covered in other sections** of this document and report on the extent to which your project achieved each of the objectives. The following is a suggested format for reporting on your other project objectives:

OBJECTIVE	OUTCOME
95% of middle school participants will participate in career exploration activities by the end of the reporting period.	100% of middle school participants participated in career exploration activities by the end of the reporting period.

Provide specific information and data to support the accomplishment of each objective. **Please keep this section brief.** If you did not meet any objective, please give a brief explanation of the causes and how you will improve on the performance in the next project (reporting) period.